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Diversity of
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INTERGOVERNMENTAL COMMITTEE FOR THE PROTECTION AND PROMOTION OF THE DIVERSITY OF CULTURAL EXPRESSIONS

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INFORMATION DOCUMENT

Challenges and opportunities for the diversity of cultural expressions in the digital era in East Asia

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Background

Recent decades have seen an impressive expansion of digital technologies. Digitalization has transformed cultural ecologies at national, regional and global levels, providing new means of cultural production, easing cultural dissemination and encouraging consumers' own creativity. With this transformation, the existing boundary between local and global, between production and consumption, and between culture and the media is increasingly blurred, resulting in new forms of creativity and new ways of cultural interaction. Yet, the digital as technology is viewed as neutral: it potentially allows for the diversification of cultural expressions and the expansion of public access to them but these new opportunities have also brought about new challenges and concerns, such as the issue of digital divides and concentration of digital platforms.¹

As “the digital” has become a defining feature of contemporary cultural life, any discussion of cultural diversity should pay adequate attention to its impacts and implications, as noted by UNESCO's Exchange Session on the Diversity of Cultural Expressions in the Digital Age (June 2015). In particular, bringing the digital agenda to the understanding of the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions (hereafter the 2005 Convention) is important given the Convention's focus on the cultural industries, which are heavily affected by the increasing use of digital technologies and online communications. The current text of the Convention refers to “information and communication technologies” and “new technologies” but how these technologies relate to the diversity of cultural expressions has yet to be explored. Similarly the Convention does not provide recommendations specific to the digitalization of culture. Digitalization does not simply mean the application of digital technologies to culture but also implies that global cultural dissemination taking place today might be better captured by the notion of “cultural flows” rather than “cultural trade”, the effects of which have been the Convention primary concern. Thus, it is timely, if not urgent, to explore the nature and impacts of digitalization with regards to the purpose, scope and implementation of the Convention.

The purpose of the report is to understand the opportunities and challenges of digitalization on diversity within the context of the arts and cultural industries in East Asia. This region covers both Northeast and Southeast Asia, the location of several leading countries in the field of cultural industries as well as those who are rapidly catching up with new technologies in order to grow their digital economy. The report recognizes that East Asia is a huge region inhabited by many different types of societies and contains a selection of a diverse range of countries in terms of geographical location, size, economic power and level of development in the digital economy: China, Singapore, the Republic of Korea, Thailand and Viet Nam. Although the chosen countries are not representative samples, they provide a series of important snapshots that show how cultural sectors and cultural policies in East Asia are responding to digitalization in diverse ways, and how the agenda of diversity in cultural expressions can be newly addressed and affirmed based on the political, social and cultural contexts in these countries. For the sake of a focused investigation and discussion, this report looks primarily at the arts (performing and visual arts) and audiovisual industries (TV, film and music).

¹ CEIM (2015) For a Diversified Networked Culture: Bringing the Convention on the Protection and Promotion of the Diversity of Cultural Expressions (CPPDCE) in the Digital Age. <http://www.ieim.uqam.ca/IMG/pdf/rapportcdccourt-en-vfinale.pdf> (accessed 1 August 2015). Page 9.

Nature and scope of digitalization

In this report, the working definition of digitalization is the application of digital technologies and online communications for the production, dissemination and consumption of cultural goods and services. It suggests that the overall implications of digitalization on culture can be summarized as the following:

- De-materialization: As cultural products become intangible digital data, the existing distinction between goods and service becomes blurred and cultural content becomes easy to store, reproduce, disseminate and archive. De-materialization potentially lowers costs for cultural production and distribution and broadens public access. Yet, there are rising tensions around ownership and control of digitalized/reproduced content and its online flows.
- Connectivity: Digitalization leads to easier, cheaper and immediate online connections between producer-producer, producer-consumer and consumer-consumer. This comes with an increased cross-national/regional connectivity that overcomes time, geographical boundaries and linguistic barriers.
- Convergence: Previously separate areas of activities are increasingly integrated, blurring the boundary between cultural production, distribution and consumption, facilitating consumer creativity, and leading to the merging between the existing cultural sector and new media.

One tendency found in the current account of digitalization is its primary focus on commercially operating cultural industries and overgeneralization that everything is being and can be digit(al)ized. However, it is important to acknowledge the existence of the dissimilar experiences of digitalization and the uneven distribution of its impacts across sectors. For instance, the discourse of digitalization on the cultural and creative industries' is dominated by economic viewpoints while stakeholders in the arts, public broadcasting and heritage policy tend to understand it from the perspective of public accessibility, education and dissemination. Also, within the field of arts and heritage, which require a physical space or collective consumption, there is an observation of the limit of digitalization in many aspects. In the surveyed East Asian countries, this appears to be reflected in the current lack of a coherent policy framework for digitalization that covers the broader cultural sector.

The report also notes that the phase or pace of digitalization of culture differ significantly from one East Asian country to another as this is closely related to the country's economic development and infrastructural capacity. While those whose economy is relatively less developed such as Thailand and Viet Nam are experiencing the issues of digital divide and exclusion, there also emerges the possibility of a "mobile leap" as the countries are young demographically² and the population takes mobile communication as an essential part of their everyday cultural and social life.³

² The proportion of young people (0-14) among the whole population in Viet Nam, Thailand and China is 23.1%, 17.7% and 17.2% respectively. See UN (2015) World Population Prospects: Key Findings and Advance Tables. <http://www.un.org/en/development/desa/population/events/other/10/index.shtml> (accessed 10 October 2015).

³ CEIM (2015) For a Diversified Networked Culture: Bringing the Convention on the Protection and Promotion of the Diversity of Cultural Expressions (CPPDCE) in the Digital Age. <http://www.ieim.uqam.ca/IMG/pdf/rapportcdccourt-en-vfinale.pdf> (accessed 1 August 2015). Page 10.

Arts, creativity and limits of digitalization

De-materialization, connectivity and convergence indicate the possibilities of new methodologies and processes within art-making resulting in new forms of creative expression and innovative ways of communicating with an audience. In the surveyed East Asian countries, there are painters, sculptors and architects who actively use digital technologies such as sampling, simulation and 3D printing as part of their production of existing art forms.⁴ Furthermore, an increasing number of artists use digital technologies and online engagement in order to create new aesthetic expressions, defining their work as “new media art”, “digital art” or “social (media) art”.⁵ These cultural expressions rely on the convergence between art, computing, coding, media, social network and virtual reality, seeking interactive modes of exhibition and performance. New media and digital artworks are likely to be de-materialized and thus easy to share via digital spaces and social networks. They can be accessible and are easily relatable to cultural consumers today, especially young audiences whose everyday cultural life is shaped heavily by new media and online connectivity. At the same time, they are recognized as new genres of art where relevant professional and expert knowledge is advanced. In the spirit of the 2005 Convention’s encouragement of countries to develop measures to nurture and support artists and others involved in the creation of cultural expressions (Article 6. g), policy makers would need to consider useful ways to assist artists and arts communities who actively use new technologies to generate new types of creativity and opportunities.

In addition to broadening the creation process and boosting new types of creativity, digital technologies have brought about substantial changes to how we record, preserve and archive existing cultural expressions, especially within the arts and cultural heritage. Although the surveyed countries do not have a coherent policy framework on the digitalization of culture, recognizable efforts have been made to digitalize, catalogue and archive within this area. East Asian policy makers regard digital cultural archives not simply as public cultural resources but also as sources where commercial cultural industries can obtain inspiration. The last two decades have seen the Republic of Korea continuously develop a number of digital cultural archives such as the Digital Archive of Performing Arts, the Arts Council Korea Arts Archive (which include a digital archive), the Gugak (traditional Korean music) Archive which include digital resources, and the Korean Film Archive (incorporating a digital cinema archive). Similarly, China has made a large investment in digitalizing their folk culture and cultural heritage, and key institutions such as the Gugong Museum (Forbidden City) and Dunhuang Research Center have made significant advances in digitalizing their collections with the support from the government. Viet Nam is also developing cultural archives such as the National Center of Cultural Heritage Archive which includes digitally recorded cultural content. In Singapore, the National Heritage Board is currently aiming to digitize every object in its collection so as to set up an online collection and portal where the general public, students, educators and researchers would be able to download images for use in the future. Centre 42, an organisation that supports the works of writers and artists to create work for the Singaporean stage, has sought to create a digital archive of Singapore theater through digitizing information and audio and visual artefacts of theater productions.

⁴ “3D-printed artwork reaches viewers” <http://vietnamnews.vn/life-style/264041/3d-printed-artwork-reaches-for-viewers.html> (accessed 24 September 2015) and “The Today Art Museum show features augmented reality display” <http://www.ecns.cn/cns-wire/2015/08-28/179038.shtml> (accessed 24 September 2015).

⁵ “Twitter and online replies become material for art making: social art is rising in the age of SNS” <http://www.hankyung.com/news/app/newsview.php?aid=2012040188051> (accessed 24 September 2015).

Going digital and online allows cultural organizations such as museums, galleries and theaters a new means of communicating and disseminating their work. They have begun showing their collections, exhibitions and video clips of performances and talks via their website and engaging with these audiences via social network and messenger services. What is notable, however, is that the products of these organizations cannot be completely digitalized and their online space is rather secondary to their physical space, tangible collection and human interaction. Of course, some websites are extensive in terms of the content they offer: from visitor information to online exhibitions and video clips (e.g. National Center for the Performing Arts, China and National Art Museum of China, and the soon to be opened National Gallery of Singapore). The organizations' focus seems to be on using digital spaces to promote their offline products rather than creating new content specifically designed for online platforms, clearly manifesting "the limit of digitalization" of those art forms and content, which necessitate a physical medium, activity and space. Although Seoul Arts Center (SAC) started the SAC on Screen series in 2014,⁶ online screening of performances is not a common practice in the surveyed East Asian countries. When it comes to most small, less-resourced organization, their online space is used primarily for information dissemination as developing an interactive digital interface would often need capital investment. There is a recognition that online screenings might be the way forward as some arts organizations are realizing that changing audiovisual consumption patterns mean that audiences now expect cultural productions to be available on demand in the comfort of their homes. However, this need is tempered by the fear that providing online screenings or performances might incur extra costs and could cannibalize their offline offerings, leading to a drop in audience attendance figures. The interviewed policy makers and practitioners indicate that online services can offer an "augmented" experience rather than a replacement to physical attendance. Another barrier is copyright: online streaming or screening requires copyright clearance, which would be a complicated and time-consuming process.

For non-mainstream, minority and independent artists who are excluded from dominant and official distribution channels, the digital space and online connectivity play key roles in reaching out to audiences, sometimes beyond national borders. Artists can promote their works and make their voices heard via alternative, online routes, not confining their work within the parameters set by mainstream views and strict censorship. In Singapore, arts organizers have found digital technologies to be a useful tool in creating, disseminating and advocating cultural expressions from non-mainstream groups such as migrant workers. For instance, Shivaji Das has used Facebook to reach out to the Bangladesh migrant worker community in Singapore as well as the mobile phone communication app, WhatsApp, to encourage them to take part in the first ever Migrant Workers Poetry Competition. In Viet Nam, Nha San Collective and San Arts, two independent art studios, are active in promoting their work domestically and internationally via their website and social networks. Within Thailand, digital technologies have enabled an independent arts practitioner to run workshops with people in the south of the country to enable them to make their own short films so as to be able to start telling their stories. Digital technologies are also helping non-governmental organizations such as the People's Empowerment Foundation, to devise new business models to enable minority communities in the north of Thailand to sell cultural products derived from their lands in an attempt to create a self-sustaining economy in order to rely less on aid.

⁶ <http://www.sac.or.kr/saconscreen/> (accessed 24 September 2015).

However, it might be over-optimistic to conclude that digitalization would automatically guarantee a greater level of diversity in artistic expressions. With an increasing quantity of digital content and online platforms, minority, independent and non-mainstream artists constantly face fierce competition for visibility and audience attention. Attracting audiences, keeping their attention and broadening their perspective is not an easy task, and the audience base for these artists could remain small. Unsurprisingly, online content of traditional culture, heritage and non-mainstream arts is heavily shadowed by that of popular cultural content such as film, TV, pop music and games. Digital and new media arts highlight potential linkages to popular culture and a strong relevance to today's media environment. Yet, it is to be determined if these converged art forms can gain popular currency among the general public in East Asia.

Cultural industries' digital transformation

East Asian cultural policy makers, industry practitioners and experts agree that, unlike the arts and cultural heritage, cultural industries have been fundamentally impacted by digitalization. As the industries' products become digital data and are made intangible, the existing distinction between physical goods and intangible service are no longer sustainable, and digital/online products are now substituting analogue/offline products: the music CD is now overshadowed by digital music; films are increasingly digitally shot, film cinema screens are being replaced by digital screens and films are now available on mobile devices; and the digital switchover of TV services has either already been completed or will be completed soon. Although cultural audiences in some East Asian countries – such as music consumers in Japan and China – are still willing to buy CDs to support their chosen artists,⁷ the rise of digital music in the form of downloading and streaming is an irreversible tide and this transformation also applies to other parts of the cultural industries albeit to varying extents.⁸ Overall, East Asian cultural industries are becoming “weightless” notwithstanding the gaps and differences between countries.

Digital technologies and online connectivity now seem to be a key part of the audiovisual production process. Yet, industry practitioners note that while there are some areas in which costs have been lowered such as the production of multiple copies of a cultural product, such a change does not necessarily mean a noticeable reduction of production costs as there is still a need to invest in digital equipment (e.g., for 3D film production), new technologies and skills development (e.g., special effects). In particular, cultural producers – especially mainstream, commercial producers who compete for audience share – would be in an increasing need for talents who are equipped with skills that match these technologies. A key issue to consider here would be the cultural industries' inherent reliance on human skills and talents that cannot be substituted by mechanical processes (Baumol and Bowen 1965).⁹ As many experts comment, this is the fundamental feature of the cultural industries and the wider “creative industries”, implying that the cost and efforts for generating creative and

⁷ Chinese interviewees, and also see “CD-loving Japan resists move to online music sales in Japan resisting” http://www.nytimes.com/2014/09/17/business/media/cd-loving-japan-resists-move-to-digital-music-.html?_r=0 (accessed 31 August 2015).

⁸ See IFPI (2015) IFPI Digital Music Report. <http://www.ifpi.org/downloads/Digital-Music-Report-2015.pdf> (accessed 24 September 2015) for the overall global trend. As for the replacement of CD sales with digital music in the Republic of Korea, see “CD, its bitter disappearance” <http://news.kmib.co.kr/article/view.asp?arcid=0923242653&code=13110000&sid1=cu1> (accessed 24 September 2015).

⁹ Baumol, W. and Bowen, W. (1965) On the performing arts: the anatomy of their economic problems. *The American Economic Review*, 55(1/2), 495-502.

innovative ideas/contents would not reduce significantly in many sections of the industries. For instance, major broadcasters in Thailand are recognizing the talent and creativity of independent TV producers and have started to hire them to produce content to fill air time on their programming schedules. In addition, interviewed experts note that promotional activities on popular online spaces could incur substantial expenses, counteracting the cost reduction effect of digitalization.

Meanwhile, digitalization has triggered the emergence of new forms of popular culture such as online comics (webtoon), web serials (or webdrama) and web-based entertainment shows. These are seen as adaptations of existing forms of comics, drama and TV shows to the online environment, and are beginning to serve successfully as original stories for other media products. In the case of web serials and entertainment shows, the shorter running time (a few to fifteen minutes per episode) and quick online releases imply a relatively smaller scale of investment and low entry barriers, in comparison with existing TV and film production, and thus a new testing ground for creative ideas and new trends. The rapidly surging popularity of web serials is indicated by the launch of Asia's first web serial festival, KWeb Fest, in Seoul in July 2015.¹⁰

According to cultural policy makers and industry practitioners in the surveyed countries, however, the impact of the digitalization is felt more strongly in cultural distribution and consumption rather than production. Firstly, distribution is becoming de-materialized, making a substantial part of physical distribution channels obsolete and redundant. Secondly, while existing companies such as terrestrial broadcasters struggle to keep up, a range of Internet-based companies have risen up to the opportunities created by digital technologies and are now offering cultural content on new media platforms on varying devices – increasingly on mobile phones. This is accompanied with new business models: mainly commercial broadcasting models (free content funded by advertising income), freemium models (free content + subscription) and subscription models. And yet, the popularity of YouTube as well as China's online video sites such as Youku Tudou and Sohu shows that the "free" provision of cultural content is at the heart of the new business model. Consumer access to online and mobile platforms is often mediated and heavily influenced by social networks. As such, cultural distribution today relies on a complex web of platforms (traditional and new) working across different sets of digital devices (non-mobile and mobile), which prioritize easy usage of popular social networks (global and domestic).

Such an environment has caused the rapid development of new media companies at both global and domestic levels. It has been found that YouTube is the most popular online video distribution platform in all surveyed countries except China.¹¹ This might be because of the massive content library of the website, including both domestic and overseas content, as well as its free-access model. A media expert in Korea points out that, although paid film and TV services online are being gradually established, typical East Asians prefer YouTube as it provides a wide range of free content. In the meantime, China has witnessed an extremely rapid expansion of domestic online video sites such as Youku Tudou, Sohu and Aiqiyi. These companies are powerhouses in the Chinese new media economy, and have already developed substantial capacity to create original content such as web serials, film and TV drama, both competing and collaborating with existing TV and film companies. The rise of these online-based companies in China can be explained by the term "Internet plus",

¹⁰ <http://english.yonhapnews.co.kr/news/2015/07/14/0200000000AEN20150714002900315.html> (accessed 31 August 2015).

¹¹ Currently, YouTube is not available in China.

meaning that these Internet-based companies are leading the convergence between the Internet and traditional cultural industries, proactively seeking, acquiring and even producing cultural content themselves.

In the meantime, other East Asian countries have also witnessed the growing of new media companies as major players in the cultural industries: e.g., Viet Nam's online-based video producers such as Zing TV, Hayhay TV and Soha TV, South Korea's Gom TV, TVing, Naver TVcast and IPTVs such as Ole TV, Thailand's Guchill TV and Singapore's Toggle TV. Witnessing such developments, East Asian TV broadcasters are becoming new media themselves, offering services via various online platforms. Yet, they are facing fierce competition with online video sites and IPTV providers for audience share and advertising income (e.g., Chinese advertisers now prefer putting advertisements on online platforms). Therefore, for public service broadcasters, producing high-quality and reliable current affairs, educational and cultural programs would be an effective way to maintain their legitimacy and visibility. Amidst the fast development and expansion of online content platforms in the five surveyed countries, there has emerged a trend of concentration. Network effects are strongly felt and the platforms' attractiveness is hugely dependent on their capacity to offer fast speeds, manage traffic and provide convenient user interfaces, which require capital investment. In a way, the concentration tendency that used to define cultural distribution offline¹² applies to online distribution too where YouTube and key domestic platforms take a central position.

The 2005 Convention calls for an environment for the cultural industries which is conducive to the production, financing and distribution of cultural goods and services from all, including non-mainstream and minority groups in society. Thus, it is imperative to consider the impacts of digitalization from this aspect. The common belief is that cultural producers in general and the minority and non-mainstream producers in particular can benefit from digital technologies and online platforms as they can reduce costs and find more outlets where they can sell and license their work. What needs to be noted here, however, is that the popular online platforms operate commercially and without public responsibilities that used to be imposed on traditional terrestrial TV (various quota of news, current affairs and education programmes) and physical screens (screen quota). One implication of this would be that cultural distribution online is very much market-driven with the platforms investing primarily on popular content. Although small, non-mainstream and indie content is available on commercial platforms, they often are too "deeply" located (difficult to be found among numerous layers of contents) and the issue of cultural diversity is hardly considered. In theory, independent producers can make their content freely and offer it on major platforms to disseminate it. In reality, the majority of such content struggles to achieve popularity. There are indie content platforms (e.g., the two Korean companies Cine 21 and Indie Plug that offer indie film content) but they tend to be much smaller than mainstream platforms and the opportunities for growth are limited. This is because, as mentioned before, the successful operation of an online platform needs capital investment with regards to servers, traffic management and interface design on one hand and audience attention on the other.

¹² For example the concentration of offline film distribution and exhibition is clearly dominated by a few major companies in each country, with some cross-national investment: South Korea's 3 majors CGV, Lotte and Megabox, Viet Nams's Galaxy Cinema and CGV Cinema, China's Wanda Cinemas, China Film Stellar Theater Chain and Shanghai United Circuit, Thailand's GTH and Singapore's Mediacorp and Golden Village.

Still, the digital space and online communications are crucial means for minority and non-mainstream groups to gather together, collaborate and engage with their existing and potential audience. For instance, LGBT communities feel the online space is a sphere where they can express their identity openly, communicate with those who are interested in their issues and organize events such as LGBT gatherings. The PinkDot Movement in Singapore has used the Internet to organize themselves, inspiring similar PinkDot gatherings internationally as well. A local academic highlights an online forum for LGBT Muslim women that connected them to each other, providing a network and information source and ultimately held meetings offline. The digital space can work as an alternative media where young people can make their voices heard. One such example is Trang, an independent group of Vietnamese youth who share a passion in producing high-quality entertainment shows of relevance to young people's ways of life and thinking. The group started a YouTube channel in November 2014 with the name Trang TV (in English "White TV"), focusing on representing young people's emotions and issues. Similarly, innovative uses of new media and social networks seem to be very important for independent musicians in China who used to be tied to the where they live and found it difficult to engage with a wider audience. The musicians nowadays can collaborate easily beyond geographical barriers via social networks and also actively showcase their work online. For example, the band Hao Meimei proactively use the Internet and social network to share their work and Leah Dou posts her new music on Weibo so it can be forwarded and recommended by not only her fans but also music experts on Weibo. The lively indie music scene matches the popularity of music sharing websites where musicians upload their new music to share with other people (e.g., Douban, Xiami, and 5SING). These platforms are also used by overseas musicians and artists who hope to introduce their work to Chinese audiences.

Recent years have also seen the rise of crowdfunding as an alternative route of cultural financing. In all five countries surveyed, crowdfunding is now seen as one of many ways to raise funds for cultural projects, especially small-scale ones. In Thailand, it is used as a way to find funds in a sector with little or no public funding, and some visual artists have crowdfunded for money for overseas exhibitions. Similarly, a crowdfunding project *The Projector* (2014) raised money to refurbish an old cinema and opened it as an independent art house cinema in Singapore where the majority of film distribution is managed by large media conglomerates. This type of social financing online allows for marginalized voices to find like-minded people and disseminate information on their issues or to provide a safe space to share their concerns. Similarly, crowdsourcing – or collective sourcing of knowledge and skills – is helpful when information and advice is needed, for example, when artists want to navigate the complex issue of censorship by connecting newer artists with more experienced ones so they can discuss potential ways forward.

In the Republic of Korea, offline crowdfunding was not common in the past but it was associated with financing alternative media and films that deliver progressive and challenging voices: e.g., the launch of *The Hangeoreh* Newspaper (1988). As crowdfunding has become a popular phenomenon, however, it tends to be less coupled now with cultural activism: it is being utilized by both non-mainstream and mainstream platforms/producers. For example, the country's tumblrbug.com is a crowdfunding website which specializes in supporting independent cultural producers and collectives¹³ while Daum, the country's second largest Internet portal, also runs a crowdfunding webpage introducing various small projects from

¹³ <https://tumblrbug.com/> (accessed 31 August 2015).

charity events to magazine publishing.¹⁴ Another sign showing the mainstreaming of crowdfunding is found in China's film industry: Baidu, Alibaba and Tencun (Tencent) or BAT collectively (China's 3 biggest online companies equivalent to Google, Amazon and Twitter respectively) finance film production, which sometimes incorporates crowdfunding as part of their film marketing strategy. This way of cultural funding seems to be potentially very useful for both mainstream and non-mainstream cultural producers as it provides not only funding but also deeper engagement with potential audiences, giving the latter a sense of ownership.

Access, sharing and convergence

The 2005 Convention encourages the access and sharing of a wide range of cultural content, beyond geographical, temporal and even linguistic boundaries, hence enriching people's cultural life while preserving the diversity of cultural expressions. Digitalization can contribute to this objective by making public cultural access easier, quicker, cheaper and increasingly transnational. What is crucial in this area is that East Asian countries have seen the increasing penetration of the internet and mobile communications infrastructure. Singapore and the Republic of Korea's broadband and mobile infrastructure is mature and the Internet penetration rate is very high. 98.5% of Korean population access the Internet (including mobile access) in 2014¹⁵. In Singapore, the number of broadband connections exceeds that of households (106.6%, 2015) and similarly the number of mobile phones exceeds that of its citizens (148%, 2014)¹⁶. China's current Internet penetration rate is 48.8% (2015)¹⁷ but the actual size of Internet-using population explains the impressive growth of online companies and services that make up one of the biggest digital economies in the globe. The size of China's digital economy is expected to increase rapidly in the near future as 94.5% of Chinese people now use a mobile phone¹⁸, potentially accessing the Internet via their phones. In the case of the countries where the Internet infrastructure is yet to be expanded, the impact of digitalization on cultural consumption might be relatively less significant. Still, they are very likely to see a constant rise of mobile access to the Internet as mobile phones are now an essential part of everyday life. In 2014, Thailand's broadband penetration rate was only 8.50% but there are 144.9 mobile phones per 100 people.¹⁹ The Internet penetration rate in Vietnam is 42.9% and there are 145 mobile per 100 people (though the smartphone penetration rate is 36%).

What is notable is that Internet use among young people is very high. For example, almost all Korean young people access film and TV content via their PCs or mobile phones, sometimes through paying Internet-based content providers. China has seen the surge of young cultural consumers and the country's TV and film industries take young audience's tastes and preferences very seriously, actively exploring social network services as a medium to disseminate their content. A survey done in 2012 by the Information Development Authority, Singapore found that almost all Singaporean residents aged below 35 years old

¹⁴ <http://m.newsfund.media.daum.net/> (accessed 31 August 2015).

¹⁵ Ministry of Science and Future Planning and Korean Internet & Safety Agency (2014) Internet Use Survey Summary Report. Seoul: MSFP and KISA.

¹⁶ Singapore Statistics (2015) Singapore in Figures. Singstat: Singapore

¹⁷ According to The 36th (the latest one) Statistical Report on Internet Development in China published by China Internet Network Information Centre, up to June 2015, the internet penetration rate is 48.8% (488 internet users among 1000 people). <http://www.cnnic.net.cn/hlwfzyj/hlwxbg/hlwjbg/201507/P020150723549500667087.pdf> (accessed 31 August 2015).

¹⁸ According to the data shown on the official website of National Bureau of Statistics of China, mobile phone penetration rate as of 2014 is 94.50% (945 mobile phone users among 1000 people). <http://data.stats.gov.cn/easyquery.htm?cn=C01&zb=A0G0X&sj=2014> (31 August 2015).

¹⁹ <http://www.nbt.go.th/TTID/> (accessed 31 August 2015).

are Internet users.²⁰ In a similar context, a report notes that watching videos online is a very popular pastime in Viet Nam, especially among young people,²¹ indicating that as time progresses East Asian societies' reliance on the Internet and mobile communications for cultural consumption will further increase.

The Internet and the new media environment facilitates this alternative mode of cultural economy, based on voluntary production and sharing, which is exemplified by the success of Wikipedia and YouTube and the abundance of User Generated Content (UGC) on social networks. In the analogue age, the provision of free content was possible mainly via commercial broadcasters relying on advertising income and the public's collective support for non-profit cultural institutions. The rise of the Internet expanded this model of business to almost all areas of cultural consumption, leading to the powerful regime of "free culture" (Lessig 2004).²² The other side of the coin is that cultural content providers find it more and more difficult to distinguish their paid services from the abundant free content and collective knowledge. Thus it is not very surprising that the existing framework on copyright is heavily challenged. Although the surveyed countries have seen the emergence of paid film, music and TV content providers working on various platforms; copying and sharing is an essential feature of the digital and online age.

While acknowledging that copyright protection is still a contested area, where different views and positions prevail, this report points out the double sided effects of unauthorized online sharing of cultural contents – such as music, TV shows and film, particularly those originated in East Asia – across national and linguistic borders. Such sharing can expand the cultural repertoire of society and facilitate cultural flows between societies. One example is the free sharing of foreign-language films and TV shows: avid members of audience themselves translate the original language into the local one, provide subtitles and share the translated versions online. The negative side of this activity would be potential copyright infringement and a decrease in audiences for domestic products: e.g., popular South Korean drama and film and Japanese manga can overshadow Vietnamese domestic products;²³ but the positive effect would include grass-root, non-commercial cultural flows and exchanges and the enhancement of mutual understanding between societies, beyond national and linguistic borders (Lee 2011).²⁴ The boom of amateur translation of foreign cultural products as well as file sharing in general indicates that cultural consumers in the digital age is difficult to manage and control, and the industries' business model should find a way to reconcile this with the "economy of sharing".

At the center of the booming economy of sharing, there is the abundance of UGC as a new type of entertainment and popular culture. Those creators could be seen as "prosumers" and their proliferation implies the diversification of the profile of cultural producers. As many interviewees across the surveyed countries have noted, UGC allows for the manifestation of the democratic nature of the digital and online making it easy to create, copy, modify, produce, converge and share cultural content – and creates the possibility of an alternative

²⁰ Infocom Development Authority of Singapore. (2013) Annual Survey on Infocomm Usage in Households and Individuals for 2012. Infocomm Development Authority: Singapore

²¹ <http://www.internetlivestats.com/internet-users-by-country/> and <https://www.techinasia.com/vietnam-internet-report-quick-internet-mobile-ecommerce/> (accessed 1 August 2015).

²² Lessig, L. (2004) *Free Culture: The Nature and Future of Creativity*. London: Penguin Books.

²³ Ministry of Culture, Sports and Tourism of Viet Nam (2013) Periodic Report on the Implementation of the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions. <https://en.unesco.org/creativity/mr/periodic-reports-available-reports> (accessed 1 August 2015). Page 18.

²⁴ Lee, H.-K. (2011) Participatory media fandom: a case study of anime fansubbing, *Media, Culture & Society*, 33(8): 1131-1147.

cultural economy based on volunteering and sharing. The creation of UGC relates to the broader popularity of “maker” and “DIY” culture where amateur creation and collaboration often employ digital technologies and online connectivity. UGC not only brings more diversity to society’s audiovisual content but also influences professional cultural producers by giving them fresh and innovative ideas. For this reason, major TV companies such as CCTV (China) and VTV (Viet Nam) are keen to interact with an audience – especially online opinion leaders – and engage them in program making. This means a significant change of professional TV producers’ relationship with their audience from a hierarchical to a horizontal one, or from government control to market consideration.

The abundance of UGC raises a question of where or who copyright ultimately resides with, and who should have control over the created content. This question has been asked by many commentators although the popular practice of online platform and social media businesses is to grant copyrights to users while keeping privileged access to utilize the content user generated.²⁵ In Singapore, the question becomes more complicated: should the copyright sit with the platform hosting the content or the creator, or with the organization that undertakes the digitization process? The country’s local theater group The Necessary Stage (TNS) have had to undertake the digitalization of their archives because working with state agencies such as the National Library Board or the National Archives of Singapore would have resulted in a transfer of their intellectual property rights. That meant that once digitized, material from TNS could be made available to any interested third party for re-use without seeking permission from TNS.²⁶ While TNS and most arts organizations are open to the idea of sharing and re-use of digitalized content, this still remains a grey area. Policy makers and cultural practitioners should consider that digital cultural content is no longer fixed or static when they discuss the rights of content creators, the roles and responsibilities of online platforms that host these materials, and the changing nature of cultural consumption. They would also need to recognize that the online environment and digital cultural consumption require copyright protection which would differ from that for offline cultural products. In addition, the development of copyright policy need to address the domestic and international scope of some of these online platforms but also recognize that possibilities for new cultural expressions are based on or built on existing copyrighted cultural contents.

The strengthened online connectivity and proliferation of self-expression indicates a potential transformation of the relationship between cultural policy makers and ordinary cultural consumers to a more direct and equal one. This could also widen the scope for cultural policy discussion involving relevant stakeholders including government policy makers, public cultural institutions, civil groups and cultural consumer communities. In some East Asian countries such as the Republic of Korea and Singapore, noticeable efforts have been made to engage civil society in policy discussion and the management of cultural organizations. Digital and online tools are key features of this progress. Policy documents and information are available online via the ministry and key agencies’ websites and some countries have

²⁵ For example, Facebook and Twitter’s terms state that users grant these platforms a worldwide, non-exclusive, royalty-free (and transferrable and sub-licensable) license to use the content users post. Modified and softer versions of such terms are used by local platforms such as South Korea’s Daum and Naver, and Singapore’s STOMP.

²⁶ Speaking with government agencies and researchers, the development of copyright and intellectual property law in Singapore is still in its infancy. There is an expectation from public agencies that if they undertake the digitalisation process, then the copyright would belong to the agencies themselves. This is currently being contested among various arts organisations within Singapore. A bigger problem that exists within government agencies is the idea that digitization is for archival purposes and little thought has been put into the subsequent use of these materials. This is problematic in an era where sharing and UGC is becoming the norm. Interviewed researchers have indicated that a change in this thinking is possible if a business case can be made but when it comes to material of arts and cultural sectors, a business case is usually not the purpose for the creation of archives.

created a dedicated online policy zone where members of the public can view key statistics and policy documents related to culture: Korean cultural ministry's Cultural Statistics Portal²⁷ is a very good example. In Singapore, REACH is an online website that allows citizens to participate and provide feedback on various government initiatives.²⁸ The Chinese government and public organizations are expanding their online communications with members of the public, especially via active using social network platforms such as WeChat. Yet, policy makers' online activities are mainly for disseminating and promoting government cultural policy and related information rather than revolutionizing citizens' participation.

Meanwhile, there are groups and communities whose access to digitalized content and opportunities for self-expression is limited due to the lack of internet infrastructure (e.g., rural residents in Thailand, Viet Nam and China), lifestyles that are not in accord with online communications (e.g., elderly people in the Republic of Korea and in Singapore), the lack of skills and knowledge (e.g., immigrants and migrants in the Republic of Korea, Thailand and Singapore²⁹) and the lack of financial resources (those who live in poverty, including less-resourced ethnic minorities). Importantly, for most East Asians today, their mobile phone is a crucial device as it allows them to be connected to and potentially access internet-based cultural provision. Therefore, strengthening mobile infrastructure and providing relevant training would be a key to widening the benefits of the digitalization and reducing geographical, generational and sociocultural divides.

Another tendency is that ethnic minority language users are increasingly marginalized as popular, mainstream-language products are widely shared and consumed online. Policy makers and cultural practitioners indicate that ethnic minority cultures are regarded as something to be preserved digitally rather than something that can be positively promoted as part of contemporary digital culture in the region. The low visibility of ethnic minority cultures online, for example in China and Viet Nam might be because of the minority groups' lack of resources and skills. Another problem faced by minority ethnic groups is that their culture is often perceived as traditional, sometimes old-fashioned, by the general public. Even if they are able to highlight their cultures using digital technologies, the groups may find it very hard to challenge the public's existing opinion and promote their contemporary creations. For example, a researcher working with minorities groups in Thailand highlights the case of the Akha, a minority group in the north of Thailand who mounted an online campaign to change the lyrics of a folksong from their community that is well-known and popular in Thailand since the 1970s. The Akha felt that the original lyrics of the song had been misread and misrepresented their culture by portraying Akha women as sexually permissive but their campaign was ultimately unsuccessful because it was not possible to shift the mind-set of the dominant culture in Thailand. Still, such bottom-up efforts keep being made: e.g., one of the key motivations of setting up the Migrant Worker Poetry Competition was to provide a positive representation of migrant workers in Singapore as an alternative to mainstream mostly negative perceptions of this community albeit it a "small one" as described as the organizer.

²⁷ <http://www.culture.go.kr/index.do> (accessed 1 August 2015).

²⁸ <https://www.reach.gov.sg/> (accessed 4 October 2015).

²⁹ The Silver Arts Initiative by the National Arts Council of Singapore is one such initiative where programmes within this initiative include funding workshops that allow senior citizens in Singapore (those aged 60 and above) to take part in digital film making classes.

Cooperation in the region and beyond

The 2005 Convention highlights the importance of international cooperation in several articles (Article 12 and onwards). All surveyed East Asian countries are engaged with various international cultural collaboration and exchange projects. Collaboration has been actively taking place between cultural industries across countries: from audiovisual coproduction, format transfer, cross-Asian investment in cinema chains and entertainment agencies to the creation of multi-national pop music bands. Performing and visual artists' regional collaboration too has expanded at various levels, from coproduction, forum, artist residence to archives such as the Singapore-based Asia Shakespeare Intercultural Archive, a digital archive of all performances of Shakespeare that take place within the region. One such initiative is the Hong Kong-based Asia Art Archive that showcases the digitalized version of artworks from China, the Republic of Korea, Japan, Viet Nam, India and many others. The proliferation of digital tools have improved the ease of communication and sharing beyond national boundaries, and this has meant that regional cultural cooperation is now much more convenient. This can greatly benefit smaller arts companies by helping them overcome financial and linguistic barriers. For instance, Singapore's The Necessary Stage used online communications as a way to work with their Japanese counterparts in developing a new work: the script was co-written and developed via emails, the meetings took place over Skype, and videos were made and shared via Facebook, radically reducing the costs involved.

At the governmental level, there are various international cultural cooperation and exchange initiatives. For instance, Viet Nam has signed 42 bilateral agreements and treaties and cultural cooperation.³⁰ China's Periodic Report (2012) notes that it has signed intergovernmental agreements on cultural cooperation with 145 countries and numerous implementation agreements on cultural exchanges in addition to actively implementing international cultural assistance.³¹ The Republic of Korea's case is not different in terms of having signed numerous international agreements and treaties and having increased cultural assistance projects with African and Southeast Asian countries.³² Yet, it is not fully certain if there are collaborative and exchange schemes that are specific to "digital" production, distribution and consumption of culture and the arts. While the digital and online have constituted an environment where cultural activities in East Asia are increasingly embedded, it appears that there is no focused policy collaboration or discussion on this area. Currently, the Chinese, South Korean and Vietnamese governments' periodic reports do not delve into the digitalization's impacts as part of their discussion of diversity of cultural expressions. For policy makers in the surveyed East Asian countries, the working definition of cultural diversity appears to be rather narrow, focusing on protecting and preserving traditional culture, cultural heritage and ethnic minority cultures. Here, there emerges a need for recapturing the meaning of diversity of cultural expressions in the context of digitalization and raising of a "digital agenda" within regional cultural policy discussion, especially in relation to the 2005 Convention.

³⁰ Ministry of Culture, Sports and Tourism of Viet Nam (2013) Periodic Report on the Implementation of the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions. <https://en.unesco.org/creativity/mr/periodic-reports-available-reports> (accessed 1 August 2015). Page 7.

³¹ Ministry of Culture of the People's Republic of China (2012) Quadrennial Report on the Implementation of the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions. <https://en.unesco.org/creativity/mr/periodic-reports-available-reports> (accessed 1 August 2015).

³² Korea Culture and Tourism Institute (2014) Study on Periodic Report on the Implementation of the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions (including a draft periodic report). Chapter 2. Seoul: KCTI.

There are noticeable “digital gaps” among the surveyed countries. If we took the broader Asia (and Asia-Pacific) region into the account, the gaps would increase enormously. More proactive initiatives of regional sharing of skills and know-how would be helpful to reduce the gaps and increase the digitalization’s benefits for the region. From this perspective, overseas cultural assistance schemes could more proactively consider potential ways of sharing and transfer of knowledge and experience in this area. There are non-governmental regional initiatives – such as ICHCAP (International Information and Networking Center for Intangible Cultural Heritage in the Asia-Pacific Region, UNESCO category 2 organization)³³ and the non-profit Asia Art Archive³⁴ – that explore varying ways of regional collaboration towards establishing a regional art and cultural resources. C-Asean is a newly established social enterprise that seeks to develop regional collaborations for cultural entrepreneurs.³⁵ These initiatives have the potential to provide a regional forum where the roles and impacts of digitalization on region’s culture could be discussed and regional sharing of related know-how could be encouraged. What is also equally important would be identifying and encouraging various grass-root initiatives by minority groups, non-mainstream cultural producers and civil societies. Knowing and sharing of the experiences of minority cultural groups’ creative uses of digital technologies and online spaces would be crucial for a better and more balanced understanding of the implications and effects of digitalization. One Korean expert in digital culture highlights the need for more regional conversation in this area, pointing out the possibility that the increasing reliance on social networks – in comparison with the use of the World Wide Web – could keep the discussion locally oriented and pertinent to local stakeholders primarily and not automatically facilitating regional and cross-cultural discussion.

Digitalization helps East Asian cultural producers to showcase their work to an international audience and seek potential partners and collaborators. This takes place at varying levels, from grass-root to government-sponsored initiatives, and often in partnership with global online platforms. As mentioned before, Viet Nam-based Nha San Collective and San Arts are proactively communicating with a global audience via both offline and online initiatives. The founder and director of the Museum of Contemporary Art Bangkok is currently in discussion with Google to digitalize the artworks in their collection offering Thai contemporary artists an international platform that would not have been possible before. In the Republic of Korea, the Korean Artist Project is an example of an online project linking the country’s visual artists to global audience and partners.³⁶ The project, which provides holistic information of the chosen artists and their works including digital exhibitions and video clips, is funded by the government and hosted by the Korean Art Museums and has recently entered a partnership with Google Art Project. Similarly, the Korean Film Archive has launched the Korean Classic Film Theater on YouTube to allow global audiences to learn and appreciate the country’s classic films including those that have been digitally restored³⁷. The country’s National Gugak Center recently launched a YouTube channel and began providing recordings of all house-produced traditional music performances. Interestingly, all of these examples highlight the central position of Google and YouTube in the digital and online showcasing and sharing of East Asian culture and the arts at domestic, regional and global levels.

³³ <http://www.ichcap.org/eng/index/index.php>. (accessed 31 August 2015).

³⁴ <http://www.aaa.org.hk/> (accessed 31 August 2015).

³⁵ <http://www.c-asean.org/> (accessed 4 October 2015)

³⁶ <http://www.koreanartistproject.com/> (accessed 31 August 2015).

³⁷ <https://www.youtube.com/user/KoreanFilm> (accessed 31 August 2015).

Opportunities

The report has found that the digitalization and the active use of online space can bring a wide range of noticeable opportunities for the diversity of cultural expressions in Asia.

- **Production:** The use of digital and online tools generates new types of creative ideas and new kind of cultural forms. It also brings changes to the production process of existing cultural forms. Some of these new digital cultural forms (such as web serials and comics) are on the way to becoming established as part of new business models of cultural industries. The digitalization has opened up new opportunities for collaboration and co-creation of cultural producers, overcoming geographical, national and linguistic barriers. Online interaction can lead to the reduction of communication and transaction costs although organizations find that digitalization does not automatically reduce production and promotion costs.
- **Distribution:** For existing visual and performing arts which needs physical artworks, performers and offline space, the effects of digitalization are felt most strongly in the area of archiving, showcasing, promotion and information delivery. Meanwhile, in cultural industries, the replacement of physical products by intangible services is being put in place. This has accompanied the diversification of business models and the rise of business models that embrace the spirit of free culture.
- **Consumption:** Digital distribution allows for greater consumer choice, immediacy between consumers and producers, more width and depth of distribution, and increasingly importantly “mobile” cultural consumption. Cultural consumers can easily transform into producers, generating their own creative expressions online and sharing them widely. Their creation constitutes a core part of free content, promoting the free culture movement online and even manifesting the possibility of an economy of sharing and volunteering.
- **The online as alternative space:** For culturally and socially marginalized groups and producers, online spaces can play key roles in promoting their identities and agendas, sometimes with much of their work taking place beyond national and linguistic borders. Often, going online can be a way to find freedom of expression when there is strong content regulation for offline cultural activities.

Challenges

- **Censorship:** In societies where there are strong political and social parameters, challenging voices and contents are subject to government's strict regulations. Among the surveyed East Asian countries, there is tight control in music, film and arts, for example, requiring artists to submit their script/lyrics beforehand to acquire a license or monitoring live performances. In some countries, such regulation applies to the online space, making politically and socially challenging content very difficult to be staged or released. As the 2005 Convention's guiding principles (Article 2) asserts, diversity of cultural expressions could benefit from freer expression of ideas and from the government acting as a facilitator rather than a regulator; in turn, socially responsible expression could be encouraged by more open debate about the existence of dissimilar viewpoints. Interviewees from some countries point out that a lot of innovative work is being done at grass-roots levels. It might take time for the Government to embrace the change and adjust their policies.

- Concentration: The cultural ecology in the digital age is composed of a complex web of creators, platforms, networks and devices. There is a consensus among the interviewed East Asian cultural policy makers and practitioners that the digital and online means help to diversify the profile of creators and enhance diversity in cultural expressions. But they also acknowledge that the trend of concentration is becoming more visible in platforms, communications networks and devices. Although there are newcomers and start-ups, the above areas tend to be defined by concentration rather than diversity: there is a noticeable domination by a few global and several large-scale domestic companies.³⁸
- Roles of global platforms: global platforms such as Google, YouTube and Facebook are playing complicated roles in the digital economy in East Asian countries. On one hand, these companies are seen as a powerful engine of US-led cultural globalization and disseminator of dominant values and ideas. On the other hand, these are the sites where varying ideas are sought, presented and shared beyond national and linguistic borders, often assisting grass-root creativity, knowledge transfer and multi-directional cultural flows. For non-mainstream and minority producers and creators, these platforms work as a useful means of advocating their work and going around society's conservative political and social parameters. For example, YouTube seems to serve as not only a site of popular entertainment but an outlet of alternative ideas and lifestyles. Nevertheless, the fact that those platforms operate according to commercial business logic and have privileged access to global big data implies that they would be the site where different forces – US cultural hegemony vs. local expression, and commercialism vs. voluntarism – contradict and converge. Equally importantly, the popularity of these platforms requires a shift in our conceptualization of global cultural distribution, from cultural trade to cultural flow.
- Digital divide: a digital divide exists across different East Asian countries, and also across different groups of people: the most excluded would be the elderly, ethnic minorities, rural residents and people with less economic and educational resources in societies with a low level of digital and online infrastructure. Meanwhile, societies where Internet access is ubiquitous, a new question is beginning to rise: if and how the inclusion of and access to digital culture can compensate for the exclusion from offline cultural activities and physical cultural facilities. In the Republic of Korea, it is reported that, for the younger generation who live in poverty and suffer from unemployment and low income, consuming digitalized culture online is perhaps the only and cheapest way to live their cultural life.³⁹ Here, it would be worth asking how “digital abundance” can be useful to address the problem of “cultural paucity” (for example, a lack of access to physical cultural facilities, goods and services), or if the former could be a manifestation of the latter. Another related question is if the expansion of online access to digitalized culture would result in the decline of physical cultural activities and venues. For arts and cultural organizations where funding is linked to their quantitative figures of audience attendance, this would impact upon policies on cultural funding.

³⁸ Kulesz, O. (2014) UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions: Analysis of parties' periodic reports and contemporary digital trends. <http://en.unesco.org/creativity/file/5cp9aqprsenpdf> (accessed 1 August 2015). Pages 8-10.

³⁹ http://news.chosun.com/site/data/html_dir/2015/02/24/2015022400161.html?news_Head1_01 (Accessed 24 September 2015).

- Lack of public interest: In spite of non-profit and independent spaces online, the most powerful online platforms are commercial and privately organized. As online providers, they are free from the existing regulation on offline and analogue media.⁴⁰ For example, popular Internet portals are not obliged to provide high-quality educational and informative content in the same way public TV (and commercial terrestrial TV) is bounded by a range of public responsibilities. In addition, it is not clear if the surveyed countries have a coherent policy framework that concerns how the online space of public cultural institutions can address the issue of public interest and cultural diversity. Even for some public institutions such as the Korean Broadcasting System, online services on its website and other new media platforms, in comparison to its services on traditional TV sets, are seen as a more deregulated and marketized area (Lee 2015).⁴¹ In the case of cultural industries in the countries where a socialist economy is giving a way to market mechanisms, the decline of government control is likely to mean market control, rather than the development of public cultural services. Among the surveyed East Asian countries, however, the regulation of new media raises complicated issues: while policy makers are encouraged to consider potential ways to secure more public interests on new media platforms and services, applying the existing regulation for the old media to the new ones would be problematic.⁴² This is particularly so in the countries where the old media has been under the government's strict censorship.
- Lack of data: Among the East Asian countries, there is a huge gap in availability of data on the arts and cultural sector and their digitalization. In some countries, the government is not active in gathering and publishing data in this area, leaving this job to the private sector. Only well-resourced private companies are capable in carrying out this research and the findings are likely to remain as their property. One of the implications would be that investments in infrastructure and audience development based on the research data are driven by economic interests. As a policy maker in Thailand highlights, private telecommunications companies tend to invest heavily in cities due to the potential of high returns which results in duplication while in rural areas there is little or no ICT infrastructure. Data that is used for market optimization can also result in ignoring the needs of minority groups where there is low or little return of investment. To ensure parity in access to digital opportunities, there needs to be an investment by governments and public agencies to generate their own data to be able to determine areas of investment and allow for parity of access across the whole country. More nuanced data can also enable governments to create more targeted approaches in engaging with groups that have limited or no access to digital tools.

⁴⁰ In 2013, the Media Regulation Authority in Singapore introduced the Broadcasting (Class Licence) Act which brought internet service providers under the same regulation as traditional forms of media.

⁴¹ Lee, H.-K. (2015, in print) Public broadcasting, the Korean Broadcasting System (KBS), and its online services in Hjorth, L. and Khoo, O (eds) Routledge Hand book of New Media in Asia. London: Routledge.

⁴² In Singapore, there has been a drive to regulate new media via the Media Convergence Report in 2012 which has been deemed to be problematic by interviewees as the basic premise of this regulation is to apply rules based on 'old media' such as newspapers and television broadcasting to "new media" without taking into consideration how differently both forms of media operate and function.

Conclusion

The report finds that the digitalization of culture and associated phenomena such as the proliferation of UGC have been driven by cultural practitioners, businesses and consumers alike while there has been a lack of policy framework in this area at both national and international levels. Without an adequate understanding of the nature of cultural digitalization, it is now difficult to comprehend the contour and shape of diversity in cultural expressions in the contemporary world. While being conscious of the danger of overgeneralization and over-exaggeration of digitalization's effects, the report believes that there is a strong case for incorporating a digital agenda to UNESCO's discussion on cultural diversity. This is likely to require a reinterpretation and expansion of some key features of the existing framework set by the 2005 Convention. For example, this report suggests that "cultural flow" could be a useful descriptor that elaborates on the global and transnational cultural disseminations that are taking place today, as it would include cultural trade and other forms of cultural disseminations across national borders, both top-down and bottom-up. Another suggestion is that the issue of diversity "within" a society or a cultural industry should be taken more seriously, in addition to cultural diversity "between" societies. For East Asian cultural policy makers who tend to interpret cultural diversity from the perspective of the promotion of traditional and ethnic minority cultures, "diversity in digital cultural expression" seems to be a new agenda which is yet to be explored. The report calls for further discussion on cultural policy's remits and capability in promoting diversity in cultural expressions at both domestic and international levels. Finally, it recognizes that "being mobile" is a powerful force that influences cultural digitalization's directions and future development.